

Global Liquid-cooled RDMA-capable High-speed Ethernet Switch Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Liquid-cooled RDMA-capable High-speed Ethernet Switch market size was valued at US\$ 722 million in 2025 and is forecast to a readjusted size of US\$ 2262 million by 2032 with a CAGR of 10.4% during review period.

A liquid-cooled RDMA-capable high-speed Ethernet switch is a high-bandwidth lossless Ethernet switching device designed for artificial intelligence compute clusters, cloud data centers, and high-performance computing environments. Its core function is to provide low-latency, high-throughput, low-loss, and predictable data transport among GPU servers, AI accelerator nodes, distributed storage systems, and cross-rack networks. These products typically use 400GE, 800GE, or 1.6TbE ports as their primary interface formats and combine RoCE, PFC, ECN, AI ECN, load balancing, telemetry, congestion visualization, and automated operations capabilities to build a lossless or near-lossless network environment suitable for RDMA traffic. Compared with conventional high-speed Ethernet switches, their key distinction lies in the use of cold-plate liquid cooling, immersion liquid cooling, hybrid cooling, or rack-level coolant delivery designs to reduce the thermal density pressure generated by switch ASICs, optical modules, and high-density ports, while improving system energy efficiency and rack deployment density. These products are commonly delivered as fixed-form-factor switches, open-rack switches, liquid-cooled switch trays, network operating system licenses, and cluster networking solutions. Major customers include hyperscale cloud service providers, AI data center operators, internet platforms, high-performance computing institutions, and large enterprise data centers.

Liquid-cooled RDMA-capable high-speed Ethernet switches are evolving from data

center networking devices into critical components of artificial intelligence compute infrastructure. Large model training and distributed inference impose much higher requirements on GPU-to-GPU communication. Conventional Ethernet switches are often insufficient in congestion control, tail latency, packet-loss recovery, and bandwidth consistency for large-scale parallel computing. As a result, lossless Ethernet switches with RoCE, PFC, ECN, AI ECN, intelligent load balancing, and telemetry capabilities have become important choices for AI cluster deployment. As port speeds move from 400GE to 800GE and 1.6TbE, and switching capacity advances into the 51.2Tbps and 102.4Tbps tiers, the network traffic and thermal load carried by a single device increase significantly. Liquid cooling is therefore moving from an optional configuration to an important design requirement for high-density AI networking. The core competitiveness of these products no longer comes only from port count and switching capacity, but also from the coordination of switch silicon, network operating systems, congestion algorithms, optical and electrical interconnects, thermal architecture, and cluster tuning. Future data center networks will place greater emphasis on end-to-end performance determinism, and devices that can solve bandwidth, latency, power consumption, and operational complexity at the same time will be more likely to win large-scale cluster deployments.

The product technology roadmap is developing through multiple parallel paths. Cold-plate liquid cooling is suitable for integration with existing racks and standardized data center facilities. Immersion liquid cooling is better suited for deployments seeking higher thermal density and stronger facility-level energy efficiency. Hybrid cooling and open-rack coolant delivery are more suitable for full-rack delivery in hyperscale AI clusters. On the networking side, RoCE remains the mainstream Ethernet transport for RDMA. PFC and ECN provide the foundation for lossless control, while AI ECN, global load balancing, congestion telemetry, slow-node detection, and automated configuration are becoming key differentiators for high-end products. On the interconnect side, conventional pluggable optical modules still benefit from deployment maturity, while LPO, NPO, CPO, and short-reach copper interconnects continue to advance around lower power consumption, reduced latency, and improved reliability. On the software side, SONiC, Junos, and vendor-developed operating systems coexist, and customers select technology paths based on openness, stability, operational tools, ecosystem compatibility, and cluster scale. Overall, the industry is unlikely to be dominated by a single technical architecture. Instead, multiple product combinations will emerge around different deployment scales, power budgets, rack standards, and network architectures.

Market demand will continue to be driven by AI compute clusters and will gradually expand into cloud data centers, high-performance computing, converged storage, and

data center interconnect. Large cloud service providers and internet platforms are typically the earliest adopters of high-end liquid-cooled RDMA switches because their training clusters are large, network utilization is high, power costs are sensitive, and requirements for cluster expansion efficiency and fault localization are stringent. AI data center operators and compute leasing platforms place greater emphasis on delivery cycles, rack-level energy efficiency, operational visibility, and compatibility with mainstream AI servers. High-performance computing institutions place more weight on low latency, deterministic forwarding, and long-term stable operation. As liquid-cooled servers, liquid-cooled racks, and high-power AI accelerators become more widely adopted, liquid cooling for switches will advance in parallel with full-rack infrastructure. Future competition will shift from standalone product sales toward complete networking solutions, software subscriptions, operations platforms, and ecosystem lock-in. Vendors with strong product validation capabilities, scaled delivery capabilities, and cross-hardware-and-software coordination will be more likely to establish long-term customer relationships.

This report is a detailed and comprehensive analysis for global Liquid-cooled RDMA-capable High-speed Ethernet Switch market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Port Speed and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Liquid-cooled RDMA-capable High-speed Ethernet Switch market size and forecasts, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global Liquid-cooled RDMA-capable High-speed Ethernet Switch market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global Liquid-cooled RDMA-capable High-speed Ethernet Switch market size and forecasts, by Port Speed and by Application, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global Liquid-cooled RDMA-capable High-speed Ethernet Switch market shares of main players, shipments in revenue (\$ Million), sales quantity (Units), and ASP (US\$/Unit), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Liquid-cooled RDMA-capable High-speed Ethernet Switch

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Liquid-cooled RDMA-capable High-speed Ethernet Switch market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include NVIDIA Corporation, Huawei Technologies Co., Ltd., H3C Technologies Co., Limited, Ruijie Networks Co., Ltd., Super Micro Computer, Inc., Celestica Inc., Hewlett Packard Enterprise Company, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Market Segmentation

Liquid-cooled RDMA-capable High-speed Ethernet Switch market is split by Port Speed and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Port Speed, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Port Speed

100G Primary Port Switch

400G Primary Port Switch

1.6T Primary Port Switch

Others

Market segment by Switching Capacity

10T-Class and Below Switch

51.2T-Class Switch

102.4T-Class Switch

Others

Market segment by Port Density

56-Port-Class Switch

64-Port-Class Switch

128-Port-Class Switch

Others

Market segment by Application

AI Computing

Cloud Data Center

Converged Storage

Others

Major players covered

NVIDIA Corporation

Huawei Technologies Co., Ltd.

H3C Technologies Co., Limited

Ruijie Networks Co., Ltd.

Super Micro Computer, Inc.

Celestica Inc.

Hewlett Packard Enterprise Company

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Liquid-cooled RDMA-capable High-speed Ethernet Switch product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Liquid-cooled RDMA-capable High-speed Ethernet Switch, with price, sales quantity, revenue, and global market

share of Liquid-cooled RDMA-capable High-speed Ethernet Switch from 2021 to 2026.

Chapter 3, the Liquid-cooled RDMA-capable High-speed Ethernet Switch competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Liquid-cooled RDMA-capable High-speed Ethernet Switch breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Port Speed and by Application, with sales market share and growth rate by Port Speed, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Liquid-cooled RDMA-capable High-speed Ethernet Switch market forecast, by regions, by Port Speed, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Liquid-cooled RDMA-capable High-speed Ethernet Switch.

Chapter 14 and 15, to describe Liquid-cooled RDMA-capable High-speed Ethernet Switch sales channel, distributors, customers, research findings and conclusion.

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